



USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 09/13 thru 09/19.

Fri. Sep 13, 2013

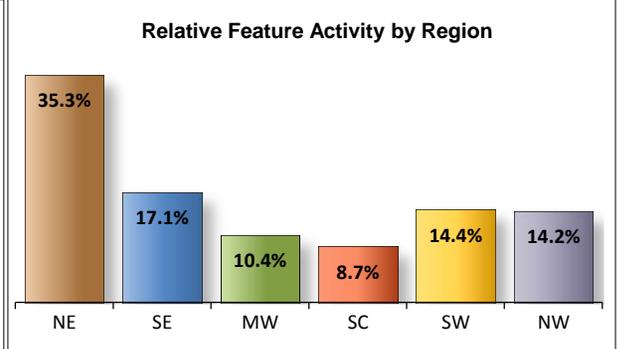
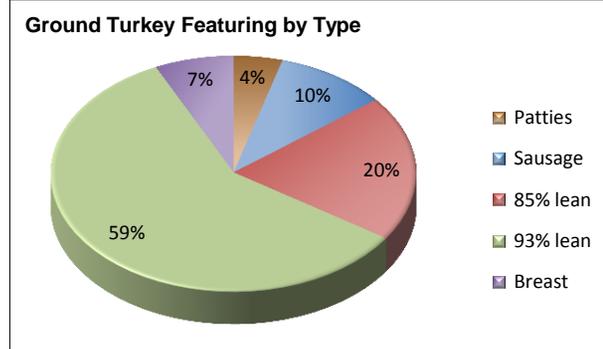
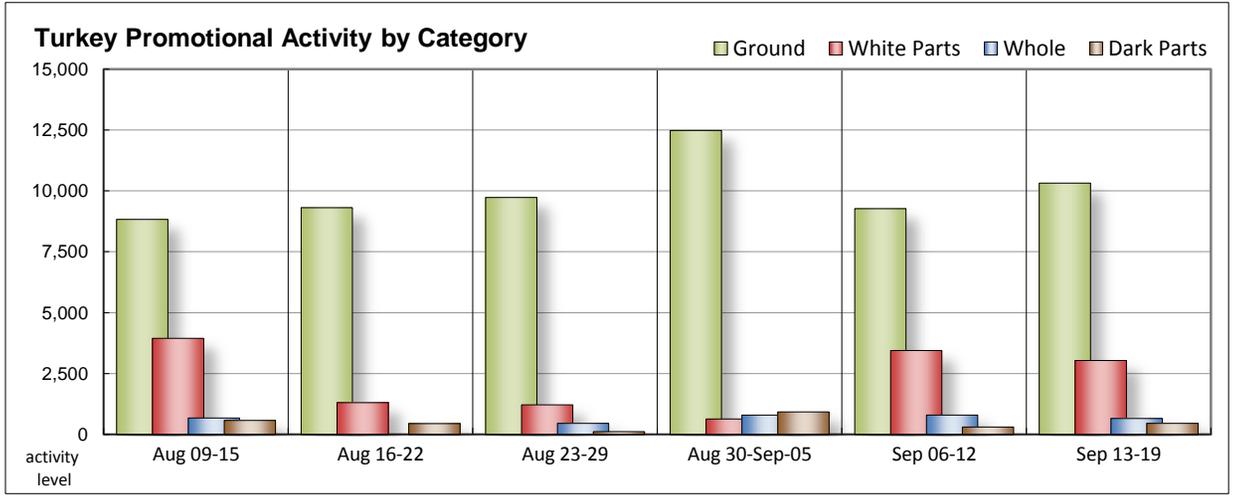
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY						
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate ^{1/}	47.2% of 23,200 outlets		44.4% of 23,200 outlets		35.4% of 22,500 outlets	
Special Rate ^{4/}	2.6%		10.7%		7.5%	
Activity Index ^{2/}	18,250		15,650		12,490	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:						
Fresh - Hens	100	1.69	400	1.88	380	1.81
" - Toms	100	1.69	400	1.88	130	1.61
Frozen - Hens	230	1.41				
" - Toms	230	1.41				
PARTS:						
Breast:						
Bone-in, whole						
Fresh	20	2.69	310	3.70	280	2.57
Frozen	950	1.67	660	1.55	550	1.71
Split, bone-in						
Fresh	250	2.99				
Rotisserie	630	7.60	280	7.28	270	7.75
Boneless, whole	10	4.99	20	4.99	110	5.09
Cutlets	700	4.82	880	4.58	340	5.19
Cutlets, thin sliced					90	4.99
Strips			540	4.99		
Tenders	480	4.49	760	4.38	160	5.08
Marinated Tenders	2,270	4.87	480	4.75	1,350	4.35
Drumsticks	40	2.05	40	1.72	280	1.91
Thighs	70	1.79	40	2.29	100	2.11
Wings	50	2.26	20	1.44	190	2.02
Necks	10	1.74	10	1.19		
Smoked Drumsticks	100	2.10	70	1.97	60	1.97
Smoked Wings	100	1.90	70	2.04	60	1.89
Smoked Necks	90	1.83	60	1.96	80	1.79
GROUND TURKEY:	10,320	3.20	9,270	3.34	7,430	3.26
Patties	450	3.76	820	3.44	580	3.10
Sausage	1,030	3.15	1,810	3.24	2,350	3.25
85% lean	2,070	2.47	2,200	2.67	1,310	2.31
93% lean	6,040	3.29	3,050	3.20	2,070	3.11
Breast	730	4.41	1,390	4.77	1,120	4.71
Rolls (frsh/frz 1 lb.)	490	2.38	240	1.91	280	2.59
Specialty ^{5/}						
Patties	190	4.47	50	3.99	130	3.49
93-94% lean	790	3.96	870	3.87	200	3.66
Breast	30	5.82	180	5.99	20	6.99

Note: rolls & specialty not included in ground turkey total and weighted average.

This Week's Turkey Feature Highlights

Retail feature activity increases going into the middle of the month. Offerings decline on fresh hens and toms, increase on frozen whole turkeys. The same is true for bone-in breasts; fewer offerings on fresh, increased offering on frozen. Shoppers looking for fresh bone-in breasts will have more luck finding split bone-in breasts. Or how about grabbing a rotisserie breast on the way home; featuring is more active but prices are higher. Looking for a boneless white part? Marinated tenders are heavily promoted; advertised prices are higher this week. Dark parts are fully represented in the ads; prices are mixed. More stores are promoting ground turkey; the weighted average price is lower. The majority of ads focus on 93% lean; price conscious consumers may prefer the more attractively priced 85% lean. Deli feature activity declines. Service deli promotional activity slows; prices on turkey are lower on whole muscle meats, higher on thin slicing meats. Chicken service deli prices are mixed. Retailers back off the self-service deli, offerings decline in volume and price.



All report information gathered from publicly available sources including store circulars, newspaper ads, and retailer websites.

1/ Feature Rate: the amount of sampled stores advertising any reported turkey item during the current week, expressed as a percentage of the total sample. **2/ Activity Index:** a measure of the absolute frequency of feature activity equal to the total number of stores for each advertised turkey item (e.g., a retailer with 100 outlets featuring 3 turkey items has an activity index of 300). **3/ Stores/Avg:** the total number of advertising outlets and the weighted average price weighted by the respective number of outlets. **4/ Special Rate:** the percentage of sampled stores with a no-price promotion (e.g., buy 1, get 1 free, etc.) **5/ Specialty:** products produced from birds raised on an all vegetable diet without antibiotics and minimally processed.



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	NORTHEAST U.S. (CT,DE,MA,MD,ME,NH,NJ,NY,PA,RI,VT)			SOUTHEAST U.S. (AL,FL,GA,MS,NC,SC,TN,VA,WV)			MIDWEST U.S. (IA,IL,IN,KY,MI,MN,ND,NE,OH,SD,WI)		
Feature Rate ^{1/}	71.2% of 4,600 sampled outlets			51.2% of 6,100 sampled outlets			25.5% of 4,200 sampled outlets		
Special Rate ^{4/}	3.4% of stores w/ no-price promotions			0.0% of stores w/ no-price promotions			5.5% of stores w/ no-price promotions		
Activity Index ^{2/}	Activity Index = 7,220			Activity Index = 4,760			Activity Index = 1,930		
	Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg	
WHOLE BIRDS:									
Fresh - Hens	1.69	100	1.69						
" - Toms	1.69	100	1.69						
Frozen - Hens	1.19 - 1.49	210	1.43	1.19	20	1.19			
" - Toms	1.19 - 1.49	210	1.43	1.19	20	1.19			
PARTS:									
Breast:									
Bone-in, whole									
Fresh									
Frozen	1.39 - 1.99	500	1.85	1.29 - 1.99	190	1.45	1.49 - 1.99	30	1.73
Split, bone-in									
Fresh	2.99	250	2.99						
Rotisserie	4.99 - 11.99	430	7.66	8.49	70	8.49	5.49	20	5.49
Boneless, whole									
Cutlets	3.99 - 5.49	340	4.80	3.99 - 4.99	70	4.47	4.69	180	4.69
Cutlets, thin sliced									
Strips									
Tenders	3.99 - 4.79	310	4.40	3.99 - 4.99	70	4.46	3.99 - 4.69	30	4.23
Marinated Tenders	4.26 - 5.33	990	4.41	4.26 - 5.33	1,210	5.27	5.33	10	5.33
Drumsticks	1.99	20	1.99				1.69 - 1.79	10	1.74
Thighs							1.79	70	1.79
Wings	2.29 - 2.49	30	2.35				1.69 - 1.79	10	1.74
Necks							1.69 - 1.79	10	1.74
Smoked Drumsticks	2.29	50	2.29	1.89	40	1.89	1.99	10	1.99
Smoked Wings	1.89	50	1.89	1.89	40	1.89	1.99	10	1.99
Smoked Necks	1.79	50	1.79	1.89	40	1.89			
GROUND TURKEY:									
Patties	2.99	20	2.99	2.99 - 3.50	60	3.22	3.27 - 3.49	20	3.36
Sausage	2.63 - 3.99	480	3.11	3.59	20	3.59	2.99 - 3.27	160	3.03
85% lean	2.19 - 3.07	370	2.53	2.33 - 2.99	1,380	2.41	2.32 - 3.50	220	2.69
93% lean	2.99 - 3.99	1,750	3.29	2.49 - 3.50	1,290	3.17	2.91 - 3.72	470	3.18
Breast (99-100% lean)	3.84 - 5.38	290	4.60	3.84 - 3.99	230	3.86	4.16 - 4.28	20	4.22
Rolls (frsh/frz 1 lb.)	1.19	20	1.19				2.49 - 3.49	310	2.57
Specialty ^{5/}									
Patties	4.79	140	4.79				3.48 - 3.99	50	3.58
93-94% lean	2.99 - 4.49	490	3.97	3.99	10	3.99	3.48 - 4.49	290	3.95
Breast	6.99	10	6.99						



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	SOUTH CENTRAL U.S. (AR,AZ,CO,KS,LA,MO,NM,OK,TX,UT)			SOUTHWEST U.S. (CA,HI,NV)			NORTHWEST U.S. (AK,ID,MT,OR,WA,WY)		
Feature Rate ^{1/}	31.6% of 4,200 sampled outlets			46.5% of 2,900 sampled outlets			65.6% of 1,200 sampled outlets		
Special Rate ^{4/}	2.1% of stores w/ no-price promotions			0.0% of stores w/ no-price promotions			10.9% of stores w/ no-price promotions		
Activity Index ^{2/}	Activity Index = 1,610			Activity Index = 1,940			Activity Index = 790		
	Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg	
WHOLE BIRDS:									
Fresh - Hens									
" - Toms									
Frozen - Hens									
" - Toms									
PARTS:									
Breast:									
Bone-in, whole									
Fresh	2.69	20	2.69						
Frozen	0.99 - 1.69	230	1.44						
Split, bone-in									
Fresh									
Rotisserie	6.99 - 10.99	110	7.17						
Boneless, whole									
Cutlets	4.69 - 5.72	90	5.26				5.72	20	5.72
Cutlets, thin sliced									
Strips									
Tenders	5.03	50	5.03				5.03	20	5.03
Marinated Tenders	4.39	30	4.39				4.39	30	4.39
Drumsticks	2.49	10	2.49						
Thighs									
Wings	2.49	10	2.49						
Necks									
Smoked Drumsticks									
Smoked Wings									
Smoked Necks									
GROUND TURKEY:									
Patties				3.49 - 3.99	270	3.90	3.99	80	3.99
Sausage				2.87 - 3.58	290	3.23	3.27	80	3.27
85% lean	2.49 - 3.19	70	2.73	2.39	10	2.39	2.71	20	2.71
93% lean	3.20 - 3.99	680	3.52	2.79 - 3.99	1,320	3.32	2.39 - 3.99	530	3.25
Breast (99-100% lean)	4.99	150	4.99	4.15	40	4.15			
Rolls (frsh/frz 1 lb.)	1.79 - 2.79	160	2.18						
Specialty ^{5/}									
Patties									
93-94% lean									
Breast				4.99	10	4.99	5.48	10	5.48



USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

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Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 09/13 thru 09/19.

(prices in dollars per pound unless otherwise noted; does not reflect all poultry items available in the marketplace)

	NATIONAL SUMMARY						NORTHEAST U.S. (CT,DE,MA,MD,ME,NH,NJ,NY,PA,RI,VT)			SOUTHEAST U.S. (AL,FL,GA,MS,NC,SC,TN,VA,WV)		
	This Week		Last Week		Last Year		90.8% of 4,600 sampled outlets			80.1% of 6,100 sampled outlets		
Feature Rate ^{1/}	74.3% of 23,200 stores		81.2% of 23,200 stores		71.7% of 22,500 stores		Activity Index = 14,920			Activity Index = 8,900		
Activity Index ^{2/}	42,620		56,190		52,680		Price Range (\$/pound)	Summary Stores	Summary Wtd Avg	Price Range (\$/pound)	Summary Stores	Summary Wtd Avg
	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg						
SERVICE DELI - Turkey												
Category 1												
Processor Brand	6,610	7.99	3,360	8.43	4,120	7.91	6.98 - 12.99	2,320	7.98	6.99 - 8.99	2,810	8.00
Private Brand	900	7.55	1,870	7.64	2,540	7.48	6.99 - 8.99	620	7.54	7.49	140	7.49
Category 2												
Processor Brand	4,800	6.10	4,320	5.79	3,620	5.85	4.49 - 6.99	1,570	6.04	4.99 - 6.99	830	6.45
Private Brand	3,020	6.99	2,980	6.33	7,170	6.54	4.99 - 7.99	1,000	6.55	5.99 - 7.99	120	3.79
Category 3												
Processor Brand	970	4.03	2,100	4.02	930	4.17	3.99 - 4.99	530	4.33	3.99	110	3.99
Private Brand	70	3.65	1,420	6.94	3,110	5.35	3.48 - 3.88	60	3.60			
Turkey Ham												
Processor Brand	200	3.34	260	3.50	530	3.58	2.99 - 3.99	190	3.30			
Private Brand	20	4.49			40	3.98	4.49	20	4.49			
Turkey Pastrami												
Processor Brand	80	3.98	490	5.40	520	3.84	3.99	40	3.99			
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	3,260	7.22	5,110	7.51	3,620	7.66	5.88 - 7.99	1,000	7.03	6.99 - 8.99	600	7.31
Private Brand	1,910	7.53	1,560	7.10	2,570	6.86	6.99 - 7.99	1,230	7.40	7.99	10	7.99
Category 2												
Processor Brand	370	5.01	210	5.57	410	5.69	5.99	20	5.99	4.99 - 5.99	70	5.10
Private Brand	550	6.03	290	5.31	1,680	5.17	5.99 - 6.99	540	6.03			
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	6,730	2.97	11,800	3.00	8,500	2.99	2.50 - 4.48	1,890	3.08	1.99 - 3.79	1,430	3.05
Private Brand	2,730	2.56	3,220	3.00	2,130	3.03	2.39 - 3.50	740	2.83	2.39 - 2.99	570	2.60
Turkey 16 oz												
Processor Brand	980	4.29	2,430	4.67	1,070	5.17	4.49 - 5.99	530	5.57	5.00 - 5.99	210	
Private Brand												
Chicken 7-10 oz												
Processor Brand	6,580	2.95	11,550	3.00	7,990	3.00	2.50 - 4.00	1,770	3.01	1.99 - 3.79	1,430	3.05
Private Brand	2,840	2.65	3,220	3.00	2,130	3.03	2.39 - 4.99	850	3.11	2.39 - 2.99	570	2.60

Category 1: composed of 1-3 whole breast lobes using no binders. (slicing)

Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)

Category 3: composed of multiple muscle pieces chopped and reformed into desired shape. (shaving)



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Feature Rate ^{1/}	MIDWEST U.S. (IA,IL,IN,KY,MI,MN,ND,NE,OH,SD,WI)				SOUTH CENTRAL U.S. (AR,AZ,CO,KS,LA,MO,NM,OK,TX,UT)				SOUTHWEST U.S. (CA,HI,NV)			NORTHWEST U.S. (AK,ID,MT,OR,WA,WY)		
	73.5% of 4,200 sampled outlets				67.8% of 4,200 sampled outlets				55.1% of 2,900 sampled outlets			52.8% of 1,200 sampled outlets		
	Activity Index = 7,860				Activity Index = 5,950				Activity Index = 3,590			Activity Index = 1,400		
Activity Index ^{2/}	Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg			
SERVICE DELI - Turkey														
Category 1														
Processor Brand	6.95 - 8.99	700	7.43	7.99 - 9.49	370	8.46	7.99 - 10.99	280	8.93	6.99 - 12.99	130	7.80		
Private Brand	7.99	70	7.99	6.99 - 7.99	70	7.33								
Category 2														
Processor Brand	4.94 - 6.99	1,110	5.91	4.39 - 6.49	920	5.78	6.99	330	6.99	5.98 - 6.99	40	6.54		
Private Brand	4.99 - 6.99	530	6.89	4.99 - 7.99	360	7.25	6.99 - 7.99	490	7.54	7.99	520	7.99		
Category 3														
Processor Brand	2.50 - 3.99	310	3.53	3.79 - 3.99	20	3.85								
Private Brand	3.99	10	3.99											
Turkey Ham														
Processor Brand	3.99	10	3.99											
Private Brand														
Turkey Pastrami														
Processor Brand	3.98 - 4.98	30	4.30				2.99	10	2.99					
Private Brand														
SERVICE DELI - Chicken														
Category 1														
Processor Brand	4.94 - 9.99	780	6.88	6.99 - 9.49	660	7.86	6.99	160	6.99	5.49 - 8.99	60	7.60		
Private Brand	6.99 - 10.99	60	7.62	6.99 - 7.99	300	7.57	7.99	290	7.99	7.99	20	7.99		
Category 2														
Processor Brand	3.98 - 4.99	110	4.82				4.99	170	4.99					
Private Brand	5.98	10	5.98											
SELF-SERVICE DELI (dollars per tub or pouch)														
Turkey 7-10 oz														
Processor Brand	1.88 - 3.99	1,480	2.91	2.00 - 3.00	1,020	2.73	2.87 - 3.99	660	3.00	2.49 - 3.99	250	2.90		
Private Brand	1.99 - 2.50	510	2.36	1.99 - 2.79	570	2.44	2.39	270	2.39	2.39	70	2.39		
Turkey 16 oz														
Processor Brand	4.99	170	4.99	5.79	70	5.79								
Private Brand														
Chicken 7-10 oz														
Processor Brand	1.88 - 3.99	1,460	2.91	2.00 - 3.00	1,020	2.73	2.87 - 3.99	660	3.00	2.49 - 3.99	240	2.92		
Private Brand	1.99 - 2.50	510	2.36	1.99 - 2.79	570	2.44	2.39	270	2.39	2.39	70	2.39		

Category 1: composed of 1-3 whole breast lobes using no binders. (slicing)

Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)

Category 3: composed of multiple muscle pieces chopped and reformed into desired shape. (shaving)